

Application for Records Disposition Standard

marta

Department, Name, and Full Address

MARTA

Dept. of Finance & Administration

Division of Budget and Analysis

100 Peachtree St., 1300 Equitable Bldg.

For Records Management Division Use

Date Received Application No. Date Completed

AUG - 7 1974 74-276 AUG 23 1974

Appl. Date

8-5-74

Telephone & Ext.

522-4460 x-388

Name

Sam Daniel

Person to Contact

Working Title

Budget Analyst

Inclusive Dates of Series

1972 - Present

Exact Series Title

Departmental Budget Analysis File

Action Requested



Establish Disposition Standard
Record will continue to accumulate



Dispose of Present Accumulation;
No Further Accumulation Anticipated

What is the function of the office in which this record series is created?

The Division of Budget and Analysis is responsible for development and installation of operating and capital budgets for all units of the Authority, conducting ongoing analysis and review to ensure that expenditures do not exceed amounts budgeted and/or authorized, performing continuing research regarding cost aspects of MARTA's programs and policies, and for comprehensive analysis of revenues. In addition, the Division is responsible for coordinating financial matters with other local governments, the preparation and/or review of MARTOC financial reports, and supporting other Divisions who may have special budgetary control problems.

*Overview
Committee*

This file contains the following documents:

Documents relating to the development, installation, analysis, and review of Departmental budgets. File series includes studies, reports, and correspondence relating to the budgets. The file is arranged by department, by division, by year.

Equipment Occupied	Vert.	Lat.	No. of Drawers	Cu. ft. of Records	Equipment Occupied	Vert.	Lat.	No. of Drawers	Cu. ft. of Records
Letter-Size File Drawers		X		1					
Legal-Size File Drawers					Annual Rate of Accumulation				1 1/2
					In Office (s)				7
					Floor Space Occupied (Square feet)				
					Average Daily References	This Years	Last Years	Preceding Years	All Prior Years
						2	0	0	0

QUESTIONNAIRE (Place an X in the proper box. If answer is "Yes" please explain.)

- 13 Is this the Record Copy of the series? ☒ Yes ☐ No
- 14 Is there a duplication of this series in another office or agency? ☒ Yes ☐ No
- 15 Is the information contained in this series ever summarized or published?
Results of analyses are duplicated in other files ☐ Yes ☒ No
- 16 Does the series contain classified information requiring security handling? ☐ Yes ☒ No
- 17 Does the series initiate, amend or terminate agency policies and procedures? ☐ Yes ☒ No
- 18 Could the function be performed if the files were lost or destroyed? ☒ Yes ☐ No
- 19 Is the series (or major portion of it) regularly microfilmed? If yes, why? ☐ Yes ☒ No
- 20 Does the record series provide data as input to an EDP file? ☐ Yes ☒ No
- 21 Does the record series contain documentation produced as EDP printout? ☐ Yes ☒ No
- 22 Has the Federal Government issued instructions governing the retention/ disposition of these files? ☐ Yes ☒ No
- 23 Will there be a need for these records 10, 15 years from now? If yes, what? ☐ Yes ☒ No

24 REQUIREMENTS:

The following requires the files to be kept 4 years: (Cite or attach copy of Law, Statute, or other reason for the retention requirement.)

By decision of the Director of Budget and Analysis.

☐ State Law ☐ Statute of Limitation ☐ Audit Period ☐ Federal Law ☒ Administrative Decision ☐ Historical Value

25 RECOMMENDATIONS - Methods: This unit recommends that the file series be cut off at the end of each

☐ Calendar Year ☒ Fiscal Year ☐ Other _____, then:

☒ Hold in the current files area 1 months/ years; then ☒ Transfer to State Records Center;

☒ Hold 2 months years; then ☒ Destroy; or ☐ Transfer to State Archives for permanent retention.

☐ Destroy after cut-off.

Operating Instructions:

26 APPROVALS:

Approved Department Records Management Officer

Jerry L. Winfrey
 Approved Division Head / Designee

P. Lynn Acting AGM
 Approved Department Head / Designee

Ken Linn
 Approved Records Management Analyst

Douglas M. Hearn
 Approved Legal Counsel

John D. Scott
 Approved Division of Audit

William V. Carasik

Date

8/5/74
 Date

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 Date

8/5/74
 Date

8-5-74
 Date

8/5/74
 Date

AUG 5, 1974

Review / Approval by Department of Archives and History

Carroll Hart *8-22-74*

Recommendations:

Approved MARTA Management Steering Committee